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automotive FLEET

CAR AND LIGHT TRUCK FLEET AND LEASING MANAGEMENT MAGAZINE

Top 100
Big '86 Buys
Chrysler's New P-Cars
Fleet Manager Award Nominees

CAPRICE

Everything you've always wanted. At the price of a Chevrolet.

Introducing your dreams come true.

Unshrunk, full-size, six-passenger room, ride and comfort.

The classic quiet and sense of well-being that comes from a long, full-perimeter frame separating engine and drive wheels.

Powerful, electronically fuel-injected, state-of-the-art V6. Plus available V8.

All topped by the pillowed luxury-car seating you'd always dreamed of sneaking into your fleet when the bean counters weren't looking.

Except now you don't have to sneak.

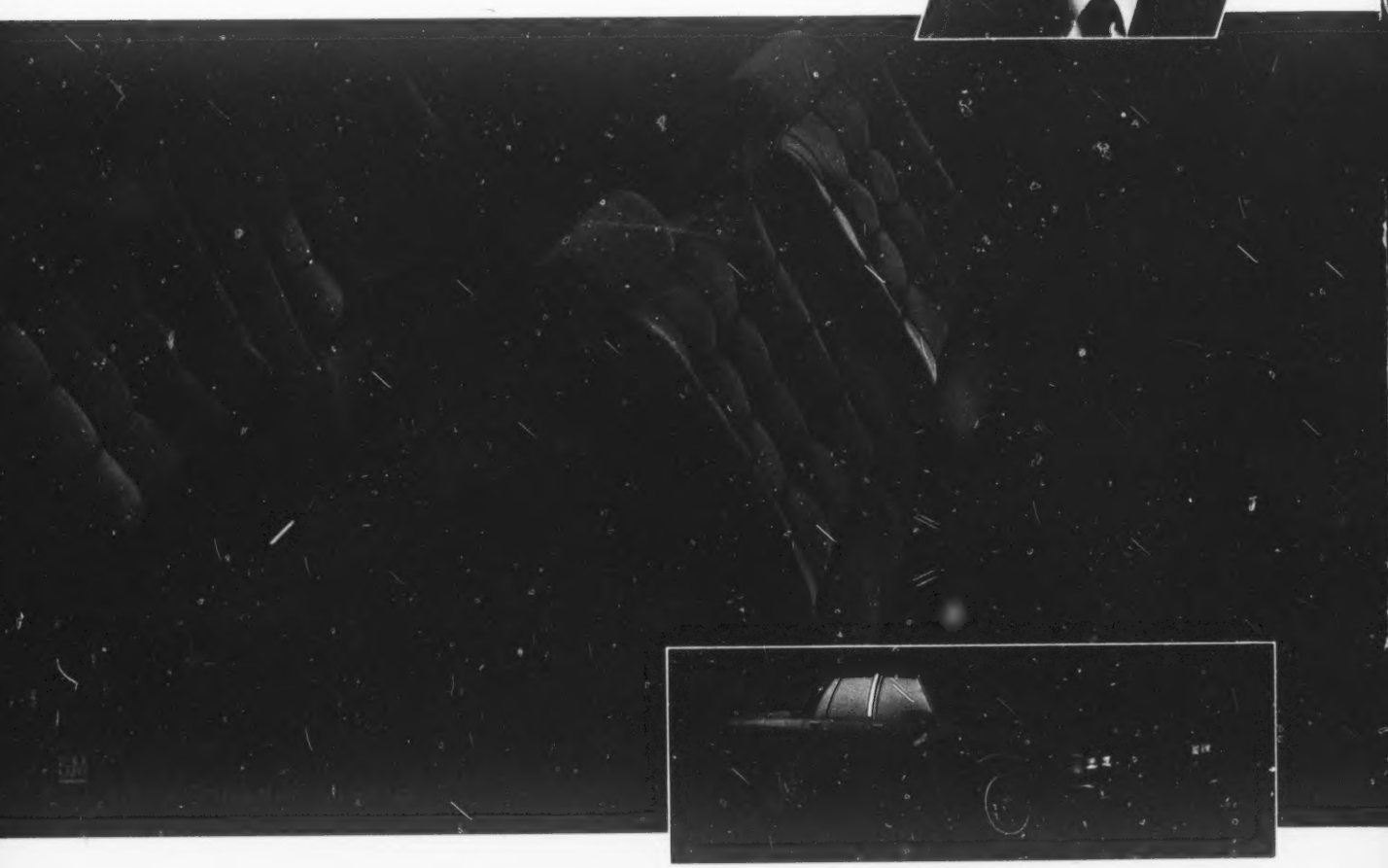
Because now it's all available at the price of a Chevrolet.

In our new Chevrolet Caprice Classic Brougham. All the value and fleet wisdom that held your heart with Impala and Caprice. Plus a little more.

Including that most desirable of all fleet-car features:

The price of a Chevrolet.

"Today's Chevrolet Caprice. What could be smarter for your fleet."



CHEVROLET FLEET SALES

Circle 101 on Inquiry Card

Top Twenty-Five Business / Commercial Light-Truck & Van Fleets

'86	'85	Company	Contact	# Lt. Trucks and Vans
1.	1.	Sears Roebuck & Co. Chicago, IL	William H. Jones, III	13,800
2.	3.	Federal Express Corp. Memphis, TN	Jim Wheeler	13,400
3.	2.	Frito-Lay, Inc. Dallas, TX	Gorman R. Green Charles Loveless	12,786
4.	4	Continental Baking Co. St. Louis, MO	Paul J. Walsh	8,160
5.	5.	ARA Services Philadelphia, PA	Ralph Jamic	5,080
6.	8.	Purolator Service, Inc. Basking Ridge, NJ	Jack Neusch	4,500
7.	13	Xerox Rochester, NY	Ron Pink	4,400
8.	—	Allegheny Beverage Cheverly, MO	Jeff Mann	4,250
9.	6.	Union Pacific System Omaha, NE	John Dyer	3,600
10.	16.	Westinghouse Pittsburgh, PA	Lou Dobak	3,433
11.	10.	Shell Oil Co. Houston, TX	Eunice Stigall	3,395
12.	7.	Interstate Brands Corp. Kansas City, MO	David Wiseman	3,361
13.	11.	Rollins, Inc. Atlanta, GA	Bob Holloman	3,350
14.	12.	Goodyear Akron, OH	A.P. Spencer	3,280
15.	20.	Canteen Corp. Chicago, IL	Mark Klein	3,200
16.	22.	Union Carbide Corp. Danbury, CT	Walt Dzitko	3,000
17.	14.	Phillips Petroleum Co. Bartlesville, OK	James I. Grillot	2,972
18.	9.	Amoco Corp. Chicago, IL	Richard Swanson	2,900
19.	18.	Exxon Co., USA Houston, TX	Jack Lamb John Dewees	2,800
20.	19.	W.R. Grace & Co. New York, NY	Edward Boheme	2,800
21.	—	General Electric Major Appliances Bus. Gp. Louisville, KY	Vic Miska	2,794
22.	15.	Tenneco, Inc. Houston, TX	J.R. "Jack" Gudelman	2,790
23.	17.	Burlington Northern RR St. Paul, MN	John Long	2,700
24.	—	Ashland Oil, Inc. Ashland, KY	Mary Lou Dougherty	2,594
25.	25.	Johnson Controls, Inc. Milwaukee, WI	Bob Borchert	2,551

Renault/Jeep®

Presents the Seventh Annual

automotive FLEET

How AF's Seventh Annual Top 100 List Was Developed

Publishing our seventh annual *Top 100* list permits us more accuracy than ever, since only a few companies remain timid about responding precisely to our survey. There is strong evidence that most companies are not only most cooperative, but proud of their ultimate ranking and of how their own company might be improving positionwise.

Since our initial survey in 1979, the original guidelines have remained intact, namely, that only business/corporate fleets with centralized automotive control (or individual fleet segments of a fleet within that company) are given consideration. Our tracking from year to year indicates that the restriction accounts for the majority of changes, since shifts in the rankings naturally take place when a company merges, centralizes, or decentralizes.

Company-controlled cars are our basic factor, along with the number of light trucks (but not lift trucks, trailers, heavy trucks, etc.) Some larger firms, such as IBM, are generally on an employee-owned and mileage reimbursement system, and these companies are not listed.

Our research department checked both by mail and phone to verify each of nearly 150 companies from known large fleets on *AF*'s circulation list. We have updated not only the vehicles under direct control, but verified the fleet contact and whether the fleet is company-owned or fully- or partially-leased.

Our researchers learned some interesting facts this year, the first that Class III trucks have been included in the survey: Kraft, Inc., number 71 in '85, becomes Dart & Kraft Financial this year, thereby soaring into fifth place. Standard Oil of Indiana has become Amoco. And newcomers to the survey in '86 are Cox Enterprises, Inc., American Bakeries Co., Continental Baking, and Interstate Brands.

AUTOMOTIVE FLEET's TOP 100

Alphabetical Cross Reference

Company	Rank
ARA Services	12
Abbott Labs	85
Aetna Life & Casualty	36
Allegheny Beverage Corp.	27
American Bakeries Company	60
American Hoechst Corp.	96
Amoco Corporation	18
ARCO Resources Technology	59
Ashland Oil, Inc.	20
Avon Products, Inc.	65
Bank of America	70
Bell & Howell Co.	92
Borg Warner Corp.	15
Brown & Root	72
Brown & Williamson	93
Burlington Northern Railroad	42
Canteen Corp.	34
Chessie System Railroads	69
Church of Jesus Christ of Latter Day Saints	10
CIGNA Corp.	61
Continental Baking Company	8
Continental Insurance	55
Crawford & Co.	51
Control Data Corp./	
Commercial Credit	44
Cox Enterprises, Inc.	49
Dart & Kraft Financial Corp.	5
Diebold, Inc.	56
Digital Equipment	6
Dow Chemical USA	41
Dresser Industries	40
Eastman Kodak Co.	31
Eaton Corp.	94
Economics Laboratory	86
Eli Lilly Company	76
Exxon Co. USA	19
FMC Corp.	80
Farmers Insurance Group	66
Federal Express Corp.	4
Frito-Lay, Inc.	2
GAB Business Services	78
General Electric Maj. Appl. Business Group	52
General Foods Co.	57
General Mills	95
Goodyear	23
Greyhound Corp.	81
Hallmark Cards, Inc.	97
Hartford Insurance	58
Hewlett Packard, Southern Reg.	100
Hewlett Packard, Western Reg.	77
Hobart Corporation	98
Hoffman LaRoche	62
Honeywell	9
Household Finance	89
IC Industries	25
Ingersoll Rand	90
Interstate Brands Corp.	46
Johnson Controls, Inc.	35
Keebler Co.	82
Liberty Mutual Insurance Co.	88
Lorillard Co.	99
Marathon Oil Co.	47
McDonald's Corp.	87
Merck & Co., Inc.	74
Minnesota Mining & Manufacturing	13
Montgomery Ward	63
Motorola, Inc.	30
NL Industries, Inc.	64
Nabisco Brands, USA	32
PPG Industries	48
Pepsi Cola	75
Pfizer, Inc.	54
Philip Morris U.S.A.	53
Phillips Petroleum Co.	39
Procter & Gamble Co.	43
Purolator Service, Inc.	28
Reliance Electric	79
Revlon, Inc.	83
Rollins, Inc.	33
SCM Corp.	84
Seaboard System RR	50
Sears Roebuck & Co.	1
Shaklee Corp.	26
Shell Oil Co.	21
Smith Kline Corp.	68
State Farm Insurance	16
Teledyne, Inc.	37
Tenneco, Inc.	22
Transamerica Corp.	67
Travelers Companies	45
Tupperware	7
Upjohn Company	73
USF&G Insurance	91
U.S. Steel	38
Union Carbide Corp.	17
Union Pacific Systems	29
United Technologies Corp.	14
Van Pool Services, Inc.	71
W.R. Grace & Co.	24
Westinghouse	11
Xerox	3

TOP 100

'86 Rank	'85 Rank	Company & Headquarters	Fleet Contact(s)	Co. Owned	Lessor(s)	# Cars	#Trucks & Vans	Total
1	1	Sears Roebuck & Co. Chicago, IL	William H. Jones, III	X	—	300	13,800	14,100
2	2	Frito-Lay, Inc. Dallas, TX	Gorman R. Green Charles Loveless	X	—	1,118	12,786	13,904
3	3	Xerox Rochester, NY	Ron Pink	—	LMV	9,500	4,400	13,900
4	4	Federal Express Corp. Memphis, TN	Jim Wheeler	X	ARI HLR Corp. FELCO	24	13,400	13,424
5	—	Dart & Kraft Financial Corp. Glenview, IL	Walter Tenclinger	X	Dart & Kraft	10,000	2,000	12,000
6	6	Digital Equipment Maynard, MA	Rick Catino	X	PH&H Gelco	9,201	1,238	10,439
7	5	Tupperware Orlando, FL	Bernie Janis Joe Fox Stan Harris	—	In-house Leasing (Dart & Kraft)	10,300	—	10,300
8	—	Continental Baking Co. St. Louis, MO	Paul J. Walsh	X	—	320	8,160	8,480
9	7	Honeywell Minneapolis, MN	Connie Wesley	—	Gelco PH&H	5,678	2,500	8,178
10	9	Church of Jesus Christ of Latter Day Saints Salt Lake City, UT	Don J. Benson	X	—	7,315	600	7,915

'86 Rank	'85 Rank	Company & Headquarters	Fleet Contact(s)	Co. Owned	Lessor(s)	# Cars	#Trucks & Vans	Total
11	11	Westinghouse Pittsburgh, PA	Lou Dobak	—	In-house Leasing, PH&H LFMC	4,398	3,433	7,831
12	10	ARA Services Philadelphia, PA	Ralph Jamic	X	Gelco	2,633	5,080	7,713
13	8	Minnesota Mining & Manufacturing St. Paul, MN	Tim R. Hoffmann H.F. Larson	X	—	6,218	1,245	7,463
14	13	United Technologies Corp. Hartford, CT	Harold Tibbits	X	Dart & Kraft Gelco, PH&H	6,200	1,200	7,400
15	12	Borg Warner Corp. Chicago, IL	Phyllis Howard	X	In-house Leasing	5,563	1,800	7,363
16	14	State Farm Insurance Bloomington, IN	Tom Sours	X	—	7,037	175	7,212
17	16	Union Carbide Corp. Danbury, CT	Walt Dzitko	X	Wheels	4,000	3,000	7,000
18	15	Amoco Corporation Chicago, IL	Richard Swanson	X	—	3,200	2,900	6,100
19	17	Exxon Co. USA Houston, TX	Jack Lamb John Dewees	X	—	3,000	2,800	5,800
20	37	Ashland Oil, Inc. Ashland, KY	Mary Lou Dougherty	X	PH&H Gelco	3,200	2,594	5,794
21	19	Shell Oil Co. Houston, TX	Eunice Stigall	X	—	2,255	3,395	5,650
22	18	Tenneco, Inc. Houston, TX	J.R. "Jack" Gudelman	X	Fleet Services	2,847	2,790	5,637
23	21	Goodyear Akron, OH	A.P. Spencer	X	—	1,855	3,280	5,135

'86 Rank	'85 Rank	Company & Headquarters	Fleet Contact(s)	Co. Owned	Lessor(s)	# Cars	#Trucks & Vans	Total
24	22	W.R. Grace & Co. New York, NY	Edward Boheme	X	PH&H	2,300 USFL	2,800	5,100
25	25	IC Industries Chicago, IL	E. Pierce Walsh Mary Anicich	X	Gelco	3,145	1,932	5,086
26	23	Shaklee Corp. San Francisco, CA	Peter D. Wood	X	In-house Leasing	5,000	50	5,050
27	—	Allegheny Beverage Corp. Cheverly, MD	Jeff Mann	X	—	750	4,250	5,000
28	33	Purolator Service, Inc. Basking Ridge, NJ	Jack Neusch	X	—	500	4,500	5,000
29	20	Union Pacific Systems Omaha, NE	John Dyer	X	Gelco	1,400	3,600	5,000
30	24	Motorola, Inc. Schaumburg, IL	Richard Kinzig	X	—	4,400	500	4,900
31	27	Eastman Kodak Co. Rochester, NY	Scott Thomas	X	PH&H	4,800	40	4,840
32	28	Nabisco Brands, USA E. Hanover, NJ	William Kiddle	X	—	3,110	1,575	4,685
33	29	Rollins, Inc. Atlanta, GA	Bob Holloman	X	B&M Equip. USFL, Wheels PH&H	1,200	3,350	4,550
34	40	Canteen Corp. Chicago, IL	Mark Klein	X	—	1,000	3,200	4,200
35	39	Johnson Controls, Inc. Milwaukee, WI	Bob Borchert	X	Gelco Southgate	1,605	2,551	4,156
36	30	Aetna Life & Casualty Hartford, CT	Martin F. Crean	X	Gelco PH&H	3,850	250	4,100
37	35	Teledyne, Inc. Los Angeles, CA	Robert A. Forsey	X	—	2,800	1,200	4,000

'86 Rank	'85 Rank	Company & Headquarters	Fleet Contact(s)	Co. Owned	Lessor(s)	# Cars	#Trucks & Vans	Total
38	32	U.S. Steel Pittsburgh, PA	W.T. "Bill" Herlihy	X	ARI, LMV USFL	1,860	2,046	3,906
39	31	Phillips Petroleum Co. Bartlesville, OK	James I. Grillot	X	—	907	2,972	3,879
40	26	Dresser Industries Pittsburgh, PA	John K. Hutchison	—	In-house Leasing	2,700	1,144	3,844
41	43	Dow Chemical USA Midland, MI	Tom Madden Sue Soper	—	CC/McCullagh Gelco, Wheels	2,500	1,235	3,735
42	36	Burlington Northern RR St. Paul, MN	John Long	X	ARI, Gecal BankAmeriLease	1,000	2,700	3,700
43	37	Procter & Gamble Co. Cincinnati, OH	Clarence O'Dell	X	—	3,600	—	3,600
44	34	Control Data Corp./ Commercial Credit Minneapolis, MN	Kathleen L. Wester	—	CC/McCullagh	3,200	400	3,600
45	41	Travelers Companies Hartford, CT	Art Derderian	—	PH&H	3,423	—	3,423
46	—	Interstate Brands Corp. Kansas City, MO	David Wiseman	X	—	—	3,361	3,361
47	44	Marathon Oil Co. Houston, TX	Lois A. Smith	X	Wheels	1,030	2,150	3,180
48	45	PPG Industries Pittsburgh, PA	Vic Pelletier	X	Leaseway	1,850	1,200	3,050
49	—	Cox Enterprises, Inc. Atlanta, GA	Duane Berger	X	McCullagh ARI, Wheels	1,000	2,000	3,000
50	48	Seaboard System RR Jacksonville, FL	Richard C. Cole	X	Dart & Kraft	763	2,150	2,513
51	58	Crawford & Co. Atlanta, GA	B.L. Garrett	—	Calesco, Inc. In-house Leasing	2,785	30	2,815

'86 Rank	'85 Rank	Company & Headquarters	Fleet Contact(s)	Co. Owned	Lessor(s)	# Cars	#Trucks & Vans	Total
52	56	General Electric Major Appliances, Bus. Grp, Louisville, KY	Vic Miska	X	GECC/Kerr In-house Leasing	—	2,794	2,794
53	55	Philip Morris U.S.A. New York, NY	Gregory J. Tarring	—	PH&H, Gelco	2,750	5	2,755
54	65	Pfizer, Inc. New York, NY	Gordon B. West	X	Gelco, Wheels PH&H	2,336	412	2,748
55	52	Continental Insurance Piscataway, NJ	William J. Benzie Victor Kaplij	X	PH&H	2,600	50	2,650
56	54	Diebold, Inc. Canton, OH	Dave Allton L. Taylor	—	PH&H	1,060	1,540	2,600
57	51	General Foods Co. White Plains, NY	Dan Quigley	X	Wheels	2,500	100	2,600
58	57	Hartford Insurance Hartford, CT	Ronald E. Weil	X	PH&H	2,520	80	2,600
59	53	ARCO Resources Technology, Dallas, TX	Bob Leaumont	X	—	875	1,656	2,531
60	—	American Bakeries Co. Charlotte, NC	R.G. Kearns	X	PH&H	125	2,400	2,525
61	61	CIGNA Corp. Philadelphia, PA	Timothy Hagarty	X	PH&H	2,350	175	2,525
62	62	Hoffman LaRoche Nutley, NJ	Dave Figurelli	—	PH&H Wheels	2,220	300	2,520
63	50	Montgomery Ward Chicago, IL	Roseann Neveitt	—	Gelco Leaseway	200	2,300	2,500
64	60	NL Industries, Inc. Houston, TX	Bernie Hodgeson	X	PH&H USFL	1,470	1,021	2,491
65	64	Avon Products, Inc. New York, NY	Maxine Sullivan	—	Gelco	2,400	69	2,469

'86 Rank	'85 Rank	Company & Headquarters	Fleet Contact(s)	Co. Owned	Lessor(s)	# Cars	#Trucks & Vans	Total
66	73	Farmers Insurance Group Pasadena, CA	Al Herzog	—	In-house Leasing	2,380	51	2,431
67	42	Transamerica Corp. Los Angeles, CA	Bill Slothour	X	In-house Leasing	2,280	140	2,420
68	72	Smith Kline Corp. Philadelphia, PA	Bill Haney Susan Gallagher John Mahoney	—	Wheels	2,240	135	2,375
69	67	Chessie System Railroads Baltimore, MD	Robert C. Drury	X	ARI, BankAmeri-Lease, New England Merchants	867	1,495	2,362
70	66	Bank of America San Francisco, CA	Don Dennler	X	—	2,060	290	2,350
71	—	Van Pool Services, Inc. Detroit, MI	Kenneth C. Sieloff	X	—	562	1,739	2,301
72	46	Brown & Root Houston, TX	Roger Ivey	X	—	300	2,000	2,300
73	70	Upjohn Company Kalamazoo, MI	Judy Rafferty	X	Wheels Leaseway	2,000	300	2,300
74	63	Merck & Co., Inc. Rahway, NJ	Alma Cristauro	—	PH&H	2,220	75	2,295
75	97	Pepsi Cola Purchase, NY	Tony Vercillo Mike Ferdinandi	X	—	800	1,460	2,260
76	74	Eli Lilly Company Indianapolis, IN	Vic Hasler Sue Webster Roger Greer	—	Wheels	2,073	175	2,248
77	77	Hewlett Packard Western Region North Hollywood, CA	Craig Kundrotas	X	—	2,207	27	2,234
78	69	GAB Business Services Parsippany, NJ	G.J. Keenan	X	PH&H Dart & Kraft	2,217	3	2,220

'86 Rank	'85 Rank	Company & Headquarters	Fleet Contact(s)	Co. Owned	Lessor(s)	# Cars	#Trucks & Vans	Total
79	75	Reliance Electric Cleveland, OH	Robert L. Burden Gary Hiles	X	Leaseway PH&H	1,500	700	2,200
80	68	FMC Corp. Chicago, IL	Lawrence Dakof	X	—	1,600	560	2,160
81	79	Greyhound Corp. Phoenix, AZ	Edward J. Bloomfield	X	PH&H	1,800	355	2,155
82	83	Keebler Co. Elmhurst, IL	Susan M. Stupak	—	Wheels Gelco	1,992	145	2,137
83	49	Revlon, Inc. New York, NY	R. Breault S. Iannone	—	PH&H Gelco	2,100	25	2,125
84	78	SCM Corp. Cleveland, OH	Nelson Hoffman	—	PH&H Wheels	1,800	300	2,100
85	84	Abbott Labs North Chicago, IL	Len Walecka	—	PH&H Wheels	1,940	150	2,090
86	85	Economics Laboratory St. Paul, MN	Tom Laumann	X	Gelco	1,571	487	2,058
87	89	McDonald's Corp. Oakbrook, IL	Jim Gorski Judy Baxter	—	PH&H	2,006	50	2,056
88	80	Liberty Mutual Insurance Co. Boston, MA	Barbara Feinberg	X	—	1,984	25	2,009
89	81	Household Finance Prospect Heights, IL	Mary Kowalski	—	Lend Lease	2,000	7	2,007
90	82	Ingersoll Rand Piscataway, NJ	Debra Donske	—	Wheels	1,394	610	2,004
91	86	USF&G Insurance Baltimore, MD	Charles H. Gittings	—	In-house Leasing	1,850	25	1,875
92	87	Bell & Howell Co. Skokie, IL	Mike Winfield	—	CC/McCullagh Wheels, ARI	1,800	10	1,810

'86 Rank	'85 Rank	Company & Headquarters	Fleet Contact(s)	Co. Owned	Lessor(s)	# Cars	#Trucks & Vans	Total
93	90	Brown & Williamson Tobacco Company Louisville, KY	Bob Whitfield	X	—	704	1,090	1,794
94	88	Eaton Corporation Cleveland, OH	Robert J. Wagner	—	Dart & Kraft	1,509	210	1,719
95	76	General Mills Minneapolis, MN	Henry Paetzel Dick Livermore	X	—	1,450	225	1,675
96	99	American Hoechst Corp. Somerville, NJ	Jim Devine Isabel Bogusz	X	Wheels Gelco	1,408	175	1,583
97	94	Hallmark Cards, Inc. Kansas City, MO	Helen Bland	X	—	1,475	75	1,550
98	95	Hobart Corporation Troy, OH	Dan Wing Mark Welty	—	Dart & Kraft	500	1,050	1,550
99	93	Lorillard Co. New York, NY	Sal Giacchi	—	Dart & Kraft Lend Lease	1,200	350	1,550
100	—	Hewlett-Packard Southern Region Atlanta, GA	William D. Smith	X	—	1,491	28	1,519

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ARCO Resources Technology	59
Ashland Oil, Inc.	20
Avon Products, Inc.	65
Bank of America	70
Bell & Howell Co.	92
Borg Warner Corp.	15
Brown & Root	72
Brown & Williamson	93
Burlington Northern Railroad	42
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Chessie System Railroads	69
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Eaton Corp.	94
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Eli Lilly Company	76
Exxon Co. USA	19
FMC Corp.	80
Farmers Insurance Group	66
Federal Express Corp.	4
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GAB Business Services	78
General Electric Maj. Appl. Business Group	52
General Foods Co.	57
General Mills	95
Goodyear	23
Greyhound Corp.	81
Hallmark Cards, Inc.	97
Hartford Insurance	58
Hewlett Packard, Southern Reg.	100
Hewlett Packard, Western Reg.	77
Hobart Corporation	98
Hoffman LaRoche	62
Honeywell	9
Household Finance	89
IC Industries	25
Ingersoll Rand	90
Interstate Brands Corp.	46
Johnson Controls, Inc.	35
Keebler Co.	82
Liberty Mutual Insurance Co.	88
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Marathon Oil Co.	47
McDonald's Corp.	87
Merck & Co., Inc.	74
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Montgomery Ward	63
Motorola, Inc.	30
NL Industries, Inc.	64
Nabisco Brands, USA	32
PPG Industries	48
Pepsi Cola	75
Pfizer, Inc.	54
Philip Morris U.S.A.	53
Phillips Petroleum Co.	39
Procter & Gamble Co.	43
Purolator Service, Inc.	28
Reliance Electric	79
Revlon, Inc.	83
Rollins, Inc.	33
SCM Corp.	84
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Union Pacific Systems	29
United Technologies Corp.	14
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Westinghouse	11
Xerox	3

NAFA's latest survey of personal use policies shows that most fleets are collecting personal use mileage charges through salary deductions. More surprisingly, they're charging drivers via a rate that's determined by mileage driven.

NAFA's Personal Use Survey

A total of 358 fleets, operating 237,710 vehicles, participated in NAFA's latest annual Personal Use Survey. The breakdown of responses is: 267 from commercial fleets in the United States; 41 Canadian fleets; 30 government fleets, and 20 public utility fleets. The Personal Use Survey covers three very important areas of fleet management: 1) when employees are able to use business cars for personal use; 2) who gets business cars, and 3) how employees are charged for personal use of business cars, or how they are reimbursed for use of the personal car for business.

Survey Highlights

- In contrast to last year's survey results, more fleets charge drivers for personal use via a mileage-driven rate rather than a flat rate each period.
- Most fleets responding to the survey collect personal use mileage charges through salary deductions rather than expense reports.
- A majority of drivers are charged their insurance policy deductible amount when they are involved in an accident while using a company car for personal use.

NAFA breaks the responses down into seven categories: Drug and Cosmetics, Chemical and Petroleum, Food and Beverage, Insurance, Manufacturing-Consumer, Manufacturing-Industrial, and Miscellaneous. *Automotive Fleet* has selected three of the above categories for this article: Manufacturing-Consumer, Manufacturing-Industrial, and Insurance.

Manufacturing-Consumer Fleets

Thirty-three Manufacturing-Consumer company fleets, responsible for 34,882 vehicles (24,941 U.S.company-owned; 8,670 U.S. - leased, and 1,271 U.S. employee-owned) responded to the survey.

Every fleet in the group allowed personal use of company cars after hours and on weekends, holidays, and vacations. Twenty-nine of the 33 responding fleets have no limit on the number of personal miles a driver can put on a car. This resulted in a monthly average of 353 personal miles driven by each employee. This, the companies repsponded, was approximately 16.5 percent of the fleet's total mileage each month.

Corresponding with this, 29 fleets charge employees for personal use of a fleet car. The split between chargeback methods is almost even: 12 use a mileage-driven charge method; nine have a flat monthly or weekly rate, and eight use a combination of both methods. Fifty-five percent (18) of these fleets have not increased the charge for personal use in the last year. The average personal mileage charge was almost 15 cents (14.6) for each mile.

The most often cited method for collecting personal use charges for Manufacturing-Consumer fleets is through an expense report deduction. Fifteen fleets, or 46 percent, use this method. The second most popular was collection via salary deduction, where 10 fleets, 30 percent, responded they used this method. Approximately one-fourth (8) of these fleets use other methods of collection.

Every fleet in the group permits personal use by both the employee and spouse. In addition, 19 of the 33 fleets allow licensed children to drive the company car. Eleven of those 19 fleets have a minimum age requirement of 18 years.

To the question, 'Is any portion of repair costs resulting from accidents during personal use charged to the operator?' 15 fleets responded 'Yes' and 18 responded 'No.' Of that 15, 10 fleets charge a dollar amount based on a percent of the cost, and five charge a "deductible" amount according to their insurance policy. No one charges the full amount of the damage and no one charges a fixed share of the cost of the damage. In 17 of the 33 fleets, the employee is charged with an accident if another person was driving the company car at the time the accident occurred.

Summary of Survey Responses

Industry Group	Number of Fleets	Company Owned Cars	Company Leased Cars	Employee Owned Cars	Total
Industrial Manufacturing	59	2,856	29,909	1,547	34,312
Insurance Companies	50	4,679	2,617	223	7,519
Drugs and Cosmetics	36	1,435	26,514	208	28,157
Consumer Manufacturing	33	24,941	8,670	1,271	34,882
Chemical & Petroleum	30	15,095	12,028	292	27,415
Food and Beverage	30	9,839	7,904	362	18,105
Miscellaneous	29	6,234	6,664	956	13,854
Totals	267	65,079	94,306	4,859	164,244

A combination of factors is used to determine who gets a company car in the Manufacturing-Consumer company fleets.

An employee's job title is the most important factor according to 24 fleets who said this was a determinant in getting a company car. Next was the mileage the employee drove in a year; 16 fleets noted this was used to assign cars. Nine fleets said cars were given as part of the employee's fringe benefit plan.

If an employee's assigned car is not in operation, there are several options the companies take to get that person a car. Thirty-one responded they rent a car; 29 let the employee use his/her own car; 14 set up a car pool system, and five are allowed to use the district manager's car.

When reimbursing an employee for business use of a personal car, most fleets pay only for mileage driven. Twenty-two fleets said they reimburse employees an average of 20 cents a mile regardless of the miles driven. Two fleets pay a fixed amount plus approximately 11 cents a mile for a cost of $133.50 a month. Two fleets use the Runzheimer Schedule, one uses a graduated scale where a certain amount is paid for the first set of miles, and a different amont is paid for any miles over that. One fleet pays a fixed rate of $35 a week.

When reimbursing an employee who used a personally-owned car because his/her assigned fleet car was not in operation, 28 fleets pay an average of a little more than 19 cents a mile, while one fleet pays an unspecified fixed amount.

Slightly more than half the fleets (17) compensate employees who, because of transfer or reassignment, are no longer eligible for a company car. The amount of compensation, in most cases, is determined on a case-to-case basis.

Two of the respondents said the IRS had conducted an audit of their companies within the last two years. That audit included investigation into the companies' personal use policies.

Manufacturing-Industrial Fleets

Fifty-nine Manufacturing-Industrial fleets, operating 34,312 vehicles (29,909 U.S.-leased; 2,856 U.S. company-owned, and 1,547 U.S. employee-owned) responded to the survey.

Ninety-seven percent of these fleets (57) allow employees personal use of company vehicles. Fifty-four fleets allow employees to use the company vehicle after working hours and on weekends and holidays. Fifty-three said employees are allowed personal use of company cars while the employee is on vacation. More than 80 percent of the responding companies have no limit in personal mileage. This results in a monthly personal mileage average of 533 miles for each employee. This, the companies cited, equals an estimated 21.7 percent of the company's total fleet mileage each month.

Forty-nine fleets charge employees for personal use of company cars. Most companies (20) charge a flat monthly or weekly rate. Fifteen fleets charge an average of 11.6 cents a mile for each personal mile the driver puts on the car. Fourteen fleets use a combination of the flat rate and mileage charge methods. The charge for personal use of fleet cars increased in more than half the responding companies: 28 percent said increases were necessary; 25 said the rates remained the same as the previous year.

Two methods for collecting personal use charges were used by almost the same number of respondents. Twenty-one fleets said they collect the money through expense report deductions, while 20 said they use salary deductions to get personal use charges. The remaining fleets cited other methods of personal use collection, but they did not specify what they were.

Almost all the fleets allow the employee's spouse to use the company car: 50 responded affirmatively while none responded negatively. Of the 23 that responded to whether they allow employee's children to drive the company car, all said

'Yes.' Slightly more than half, 28, said they have a minimum age requirement for driving a company car and 27 said they do not.

In answering the question, 'Is any portion of repair costs resulting from accidents during personal use charged to the operator?' the same number of fleets (29) responded 'Yes' and 'No.' Of the 29 who charge the operator, 14 charge the insurance company "deductible" amount, eight charge a dollar amount based on the cost of the accident, two charge a fixed dollar-amount, and one fleet charged the operator the full amount of the damage. Out of 54 responses, 37 said they charge the operator with an accident if another person was driving the company car at the time the accident occurred.

There are two major factors that determine who gets a company car in Manufacturing-Industrial fleets: job title and number of business miles driven. Job title was a determining factor for 47 fleets, and, in 33 fleets, if a driver averaged approximately 13,300 miles a year, he/she was assigned a car. Sixteen fleets said they give out company cars as part of the employee's fringe benefit plan. Five fleets gave "other" reasons for assigning company cars.

Personal Use Survey Summary

	Industrial Mfg. (59)		Insurance Cos. (50)		Drugs & Cosmetics (36)		Consumer Mfg. (33)		Chemical & Petroleum (30)		Food & Beverage (30)		Misc. (29)	
	Yes	No	Yes	No	Yes	No	Yes	No	Yes	No	Yes	No	Yes	No
Personal Use Permitted	56	2	24	0	35	1	33	0	28	2	30	0	26	3
After Work	51	1	24	0	35	1	33	0	25	2	30	0	25	3
Weekends & Holidays	54	1	24	0	35	1	33	0	25	2	30	0	23	4
Vacations	53	2	24	0	35	1	33	0	16	11	29	1	21	5
Limits on Personal Use	5	50	3	21	1	34	4	29	7	18	5	24	6	22
Charge For Personal Use	49	4	20	2	23	6	27	2	19	4	27	1	23	4
Mileage Charge	15	0	7	0	7	0	12	0	8	1	15	1	10	0
Flat Rate	20	0	8	0	7	0	9	0	8	0	11	2	6	0
Both or Other	14	0	8	0	14	0	8	0	4	0	7	2	7	0
Charge Collected By:														
Expense Report	21	1	5	2	17	0	13	2	3	1	9	3	5	2
Salary Deduction	20	1	10	1	10	0	10	0	10	0	17	2	8	0
Both or Other	11	0	5	0	6	0	8	0	9	0	3	0	10	0
Use Permitted By:														
Employee & Spouse	50	0	20	0	34	0	33	0	17	0	30	0	19	0
Employee & Children	23	0	8	0	20	0	19	0	6	0	14	0	9	0
Employee & Others	4	0	1	0	5	0	0	0	2	0	2	0	0	0
Minimum Age Limits	28	27	5	18	15	19	12	20	10	18	12	17	8	15
Repair Cost Paid By:														
Employee	29	29	17	33	14	20	15	17	6	23	12	18	9	19
Full Amount	1	—	2	—	1	—	0	—	1	—	0	—	0	—
Fixed Share	2	—	0	—	1	—	0	—	0	—	0	—	0	—
Dollar Amount	8	—	4	—	10	—	10	—	3	—	2	—	2	—
Insurance Deductible	14	—	10	—	6	—	5	—	1	—	10	—	7	—
Accident Charged	37	17	21	22	20	11	15	14	9	14	20	9	8	15
Increased Charge in 1985	28	25	11	11	18	12	11	17	14	14	16	14	8	14
Alternate Transportation:														
Employee	56	1	45	0	34	0	29	1	25	2	26	3	28	0
Rental Car	47	3	47	0	35	0	31	0	26	2	24	1	20	2
District Mgr's. Car	17	13	6	11	9	5	5	11	12	9	12	5	8	5
Car Pool	36	7	31	6	14	5	14	6	23	4	18	5	17	4
IRS Audit	3	51	7	42	2	32	2	29	1	25	5	24	3	25

Note: — means that there were no responses to this question.

If an employee's assigned car is not in operation, Manufacturing-Industrial fleets are likely to take one of three major alternatives to get that person a car. Most fleets (56) said they allow the employee to use his/her own car until the company car is operable. Forty-seven fleets rent a car, and 36 use a car pool system. Seventeen fleets allow drivers to use their district manager's car.

When reimbursing an employee for business use of a personally-owned car, 48 of these fleets pay only for mileage driven. The average cost paid per mile is 20.3 cents. Five fleets pay a fixed dollar amount plus an average of 8.2 cents a mile for an average monthly payout of $204.88. Three fleets use the Runzheimer Schedule, three use a graduated scale of payment, and two pay an unspecified fixed amount each month.

Thirty respondents said they compensate employees who, because of transfer or reassignment, are no longer eligible for a company car; 26 said they did not.

An overwhelming majority (51) said they had not been audited by the IRS within the past two years. The three that were audited said the audit included an investigation into the company's personal use policies.

The seven insurance fleets audited by the IRS had their personal use policies investigated.

Insurance Company Fleets

Fifty insurance companies in charge of 7,519 vehicles (4,679 U.S. company-owned; 2,617 U.S. leased, and 223 U.S. employee-owned) responded to the survey.

Of the 24 fleets that responded to questions regarding when employees could use company cars for personal use, all said employees could use them after work hours, and on weekends, holidays, and vacations. (Twenty-six fleets did not respond to this question; none said no.) Twenty-one of the 24 fleets have no limit on the number of personal miles a driver can put on a car. This results in a monthly average of 466 personal miles for each driver, which, the companies estimate, is a 22.5 percent of the total fleet mileage.

Twenty of 22 fleets charge drivers for the personal mileage they put on the company car. Eight fleets charge a flat monthly rate; eight charge a flat monthly rate plus a mileage fee, and seven charge only a mileage fee. Eleven fleets increased, from last year, the fees they charge drivers for personal mileage; eleven fleets also kept the same rates as the previous year.

Twice as many fleets collect the charges for personal use of company cars through salary deductions as those who collect otherwise. Ten fleets use the salary deduction method; five collect through expense account deductions, and five use "other" methods.

Of the 20 fleets that responded, all allowed personal use of company vehicles by the spouse of the employee. Eight also allowed personal use by the children of the employee and one allowed personal use by "others." Eighteen of 23 responsing fleets have no minimum age requirement for personal use of business cars.

Seventeen of 50 fleets charge employees for a portion of the costs resulting from accidents during personal use of a company car. Ten fleets charge the insurance "deductible" amount; four charge a dollar amount based on the cost of the accident; two charge the full amount; one bases charges on "other" criteria. Twenty-one of 43 fleets charge the employee with an accident if another person is driving the car at the time the accident occurred.

Two reasons were noted as most significant in determining who gets a company car. Thirty-four fleets said the average yearly mileage is a determinant. Drivers who average 11,922 miles a year usually are assigned a company car for insurance company fleets. Thirty-three fleets use the employee's job title as a criterion for assignment of a company car. Seven fleets give a company car as part of the employee's fringe benefit plan; three cite "other" reasons for assigning cars.

When an employee's company-assigned car is inoperable, 47 fleets rent a car for him/her; 45 fleets allow the employee to use his/her own personal car, and 31 fleets set up a car pool system. Six fleets allow the drivers to use the district manager's car.

When reimbursing an employee for business use of a personal car, 45 fleets responded they pay only for mileage driven. The amount they paid was 20 cents a mile. Four fleets use a graduated scale of payment where a certain amount is paid for the first set of miles and a different amount is paid for any mileage over that. One fleet used a fixed amount of payment plus paid for mileage. The payment for mileage was not given, but the average total monthly payment was $245. One fleet uses the Runzheimer Schedule of payment.

When reimbursing an employee who uses a personal car, because his/her company-assigned car is inoperable, 48 fleets pay for mileage only. No other methods of payment were given for this situation.

To the question, 'Does your company compensate employees, who, because of transfer or reassignment, are no longer eligible for a company car?' 27 insurance company fleets said 'Yes' and 19 said 'No.' Forty-two fleets had not been audited by the IRS in the previoius two years. The seven fleets which were audited had their personal use policies investigated. AF

Though gasoline prices and car-loan interest rates both declined, it still cost more to own and operate a vehicle in 1985 than it did the year before. In this article, analysts from the Hertz Corp. tell why.

New Car Ownership & Operating Outlays Climb

Despite drops in gasoline prices and car loan interest rates, 1985 automobile ownership and operating expenses rose for the twelfth year in the past 13, as typical compact models reached a record 47.64 cents a mile, up 4.3 percent, or 1.97 cents, from 1984's 45.67 cents, according to the Hertz Corp.'s latest annual estimates.

Since 1972, the last year before the first Arab oil embargo, outlays to own and run typical U.S. cars soared 189 percent, with only 1983 recording a 5.2 percent decline. By contrast, the nation's overall living expenses climbed 157 percent in the same period, the report noted.

The new Hertz survey shows 1985 increases in insurance, licenses, taxes, fees, maintenance, repairs and depreciation — the difference between car purchase price and resale value. These items more than offset slight fuel and loan cost declines.

Typical 1985 compact car purchase prices shot up nearly 8 percent to $9,834, from 1984's average of $9,113. Purchase price increases can boost depreciation, loan, tax, and insurance outlays, the study points out. The 47.64 cents-a-mile 1985 figure is for a normally-equipped compact make, purchased new and driven 10,000 miles annually for five years.

Hertz estimates average auto costs over a full year. "If interest rates and oil prices continue declining as they have in recent months, 1986 vehicle expenses could drop significantly," the rental company said.

Automotive expenses differ significantly by vehicle size, optional equipment, annual mileage, ownership duration, and where autos are driven, the company noted. Also, cars purchased new or used and kept for longer periods cost substantially less than those traded frequently, the firm's latest study shows.

In the new report, subcompact models showed the sharpest 1985 advance, rising 11.7 percent to 40.92 cents-a-mile from 36.63 cents in 1984, largely because more than half of the buyers of these mini-cars equipped them with air-conditioning, an option not included in 1984 figures. Standard-sized autos jumped 4.5 percent to 62.97 a mile, some 54 percent above the subcompact's estimated cost.

(See chart for recent per-mile cost estimates for different sized cars purchased new and driven 10,000 miles annually for five years, typical mileage and use figures for individual U.S. motorist.)

Study figures also demonstrate that keeping cars longer can save:

- New 1985 compacts driven 10,000 miles a year but traded annually cost 57.25 cents a mile, 9.6 cents more than those kept the more typical five years;
- Compacts retained 10 years and

Hertz 1978-1985 Cost Estimates by Car Size

Year	1985	1984	'85-84 % Change	1983	1982	1978	'78-85 % Change
Car Size							
Subcompact	0.4092	0.3663	+.117	0.3463	0.3418	0.2252	+.817
Compact	0.4764	0.4567	+.043	0.4328	0.4467	0.2485	+.917
Mid-size	0.4715	0.4861	−.030	0.4546	0.4902	0.2873	+.641
Intermediate	0.5223	0.5019	+.041	0.4956	0.5009	0.2891	+.807
Standard	0.6297	0.5977	+.054	0.5542	0.5231	0.3233	+.948
5-Size Average	0.5018	0.4817	+.045	0.4567	0.4605	0.2747	+.826

Hertz Estimates of 1985 Model New Passenger Car Ownership & Operating Costs Compact Model

Years Used	Averages At Constant 8586 M.P.Y. cP.M.	Averages At Constant 8586 M.P.Y. $P.Y.	8586 Averages At Declining Annual Miles Averaging 8586 Over 10-Year Period M.P.Y.	8586 Averages At Declining Annual Miles Averaging 8586 Over 10-Year Period cP.M.	8586 Averages At Declining Annual Miles Averaging 8586 Over 10-Year Period $P.Y.
1	0.6370	5,468.89	13,060	0.4616	6,029.05
2	0.6076	5,217.07	12,073	0.4698	5,671.39
3	0.5777	4,960.45	11,318	0.4677	5,293.43
4	0.5528	4,746.44	10,598	0.4705	4,986.20
5	0.5330	4,576.05	10,156	0.4708	4,781.78
6	0.4945	4,245.62	9,859	0.4456	4,393.05
7	0.4653	3,995.36	9,618	0.4281	4,117.76
8	0.4400	3,777.45	9,352	0.4164	3,894.34
9	0.4217	3,620.94	9,032	0.4083	3,688.08
10	0.4058	3,484.05	8,586	0.4058	3,484.05

also run 10,000 miles a year averaged 36.87 cents a mile, 10.8 cents less than five-year ownership, and some 20.38 cents under costs for annual trading. This produces savings of $20,380 over the car's life-span, the study shows.

The Hertz data reports that over the past 13 years motorists have been driving less, keeping cars longer, and purchasing smaller vehicles with fewer options, in an attempt to keep driving outlays within family incomes:

- From 1972 to 1983, average yearly passenger car mileage dropped 22 percent from 10,362 to 8,037 miles before turning back upward to 8,317 in 1984 and 8,586 miles last year;
- Compact cars, rather than intermediates, are now the most typical new models purchased;
- New cars are now kept an average of 5.2 years against 3.6 and,
- The average age of all cars on the road is now 7.6 years versus 5.7 years in 1972.

Hertz study figures show that some three-quarters of all auto outlays for typical driving are in so-called "fixed" or "standing" expenses such as depreciation, interest, insurance, licenses, taxes and fees. These are largely influenced by the car's purchase price and how long the vehicle is driven. "Variable" or "running" costs — such as gasoline, oil, maintenance, repairs, parts and accessories — comprise the remaining 25 percent of the expenditures.

Trading a car sooner raises the "fixed" to variable ratio (to about four-fifths of total charges) while keeping one longer usually lowers it (to roughly two-thirds).

The company's report stressed that variations in annual driving distances also have a material effect on the cents-per-mile costs because annual fixed dollar outlays are divided by more, or fewer, miles.

For the five-year driver, a new 1985 compact's costs ranged from 89.24 cents a mile at 5,000 miles a year to 30.6 cents at an annual 20,000 miles of driving — 58.64 cents a mile *less*!

However, on an annual dollar basis, 5,000 miles a year totals just

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Hertz Estimates of 1985 New Car Ownership & Operating Costs

At Constant Annual Mileages
(in cents per mile)

Years Use	Sub Compact	Compact				Inter-mediate	Standard
	10000	5000	8586	10000	20000	10000	10000
1	0.4807	1.0321	0.6370	0.5725	0.3349	0.6280	0.7671
2	0.4609	0.9721	0.6076	0.5447	0.3312	0.5999	0.7267
3	0.4382	0.9055	0.5777	0.5146	0.3201	0.5684	0.6840
4	0.4207	0.8660	0.5528	0.4919	0.3122	0.5443	0.6518
5	0.4092	0.8294	0.5330	0.4764	0.3060	0.5283	0.6297
6	0.3837	0.7618	0.4925	0.4437	No Data	0.4939	0.5850
7	0.3642	0.7070	0.4653	0.4191	Over	0.4680	0.5512
8	0.3488	0.6649	0.4400	0.3987	100,000	0.4465	0.5233
9	0.3359	0.6288	0.4217	0.3821	Miles	0.4291	0.5005
10	0.3255	0.6017	0.4058	0.3687	—	0.4149	0.4819

$4,147, while 20,000 miles a year comes to $6,120 — $1,973 a year more. The average driving distance for U.S. passenger cars in their first five years of service was 10,156 miles in 1984, the latest year for which there are mileage figures.

Driving expenses can vary so dramatically under such a wide array of circumstances that each motorist should figure his or her own outlays, Hertz said.

For example, parking and tolls can add 10 to 40 cents a mile in major cities, but can vary substantially even for similar autos in the same city if driving patterns differ.

The yearly studies by Hertz cover all auto expenses except parking and tolls. Included are insurance, licenses, registration, inspection, depreciation (the difference between purchase price and resale value), and other fees, plus interest, maintenance, accessories, and repairs, along with gasoline and other service station charges. AF

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Circle 153 on Inquiry Card

It wasn't that long ago that cassette players were considered luxury items. Times are changing. Find out what Pfizer, Nabisco and Kellogg discovered after adding cassette players to their fleets.

Listen, Learn, and Earn: Cassette Players in Fleet Vehicles

Will fleet vehicles of the future contain cassette players as a matter of purchasing practice? While no one really knows, the experience of some fleet operators who've equipped vehicles with cassettes indicates the possibility exists.

What's being discovered is that combining drive-time hours with a reasonable diet of appropriate taped material can have a dramatic influence on employees. When it comes to the dollars and cents involved, at least one fleet manager is convinced that any added costs are overshadowed by increased sales.

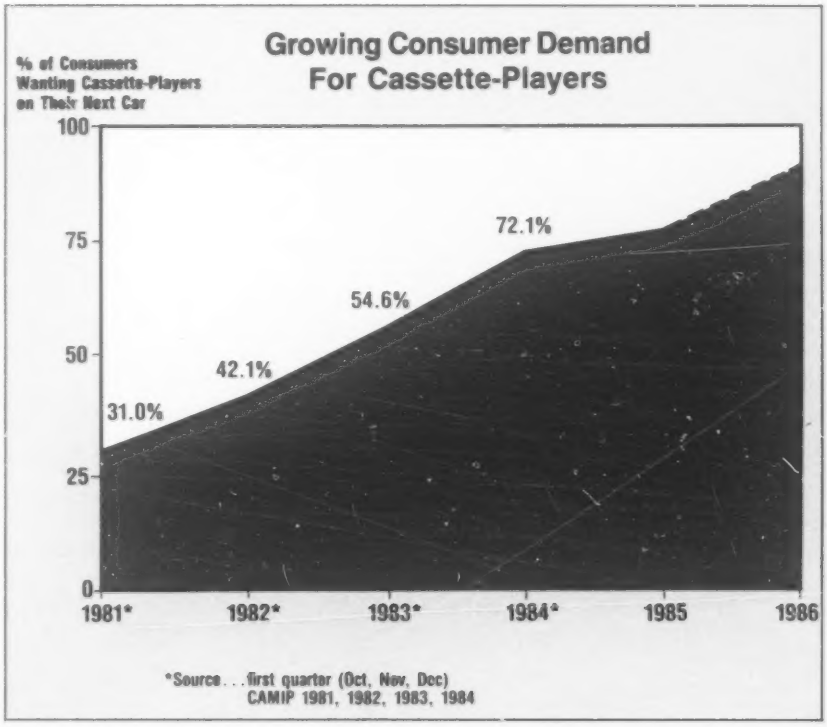
One of the more striking tape-success stories is that of Pfizer, the prestigious pharmaceutical firm. Pfizer operates a corporate fleet of 2,250 cars, all of which are equipped with cassette players.

Gordon B. West, Pfizer's corporate fleet manager, says he noticed that members of the sales staff were making extensive use of portable cassette players to listen to taped information about new products the company was preparing to release. Concerned about the safety of drivers who had to grope around the seat to operate equipment, and about the fact that some portable units had been misplaced, West began a program in 1982 to phase in factory-installed cassette players on all cars. West says the program has been so successful that if a replacement vehicle is purchased without a cassette player, he will have one installed.

West says the main reason for cassette-playing capability is to allow sales personnel a safe, convenient way to learn about new product releases, considering the fact Pfizer is continually releasing new products. West adds that he knows a lot of other material is popped into the cassette player, but he considers that a plus if it helps take the edge off travel time.

Another leader in exploring the potential use of tapes during drive-time is Nabisco, which has made a definite commitment in its Sales & Distribution Division.

Joel DeFalco, fleet manager of that division, says there is a real excitement about the program. Presently, the division fleet has approximately 1,100 cars slated to be equipped with factory-installed cas-



sette players within three years. By June of this year, about 400 of the division's fleet cars will be cassette-equipped.

A major program is underway by the training department to prepare tapes. DeFalco says, "We have a training department and it is developing a specific program. We are so enthused about the potential that we aren't going to wait until we have all our cars equipped.

"We're totally convinced we can transform some of that drive-time into highly productive time for our employees," DeFalco goes on. "Feedback we are getting convinces us the sales staff is equally enthusiastic."

This full-factory AM/FM stereo cassette offers auto reverse, seek/scan, dynamic noise reduction, and a clock.

DeFalco sees a variety of possibilities with tape cassettes. Among company plans are preparation and distribution of tapes on "Where we stand," and "How we are doing in sales." He sees the system as a way of offering seminars without as much expense as now is required to bring people out of the field to a seminar location. The result, DeFalco says, is that more learning opportunities can be offered to more people without spending more money.

"We can provide training materials to be absorbed between stop A and stop B in a city, or during a longer drive from city to city," he explains. "Additionally, our sales staff can have the advantage of listening to what they want to hear, getting clear reception of taped material in areas where radio reception is not so great."

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The effectiveness of tapes in spurring sales has also been witnessed by two other major companies, although their tape programs were not geared specifically to drive-time. According to Nightingale-Conant, one of the nation's leading providers of motivational tapes, GTE Directories Corp., ordered 790 sets of motivational tapes for its salespeople. The company was so pleased with the results, it ordered 895 copies of another program.

Kellogg ordered 425 tapes for members of its sales staff. Company officials were pleased with the results and ordered three additional programs about five months later, Nightingale-Conant reported, adding that increased Kellogg sales during the following 23 months were such that the company turned around and ordered five more new programs.

Will employees make use of cassette players in fleet vehicles? DeFalco certainly thinks so.

"I've already gotten great feedback from the field on the division's program," he says.

Another perspective offered by DeFalco is the desire of employees to have cassette players in their vehicles. "We have allowed our fleet users to order cassette players, at their own expense, in company cars for a number of years. The requests have continued to increase year after year and, I believe, would have reached close to 100 percent by next year," DeFalco says.

In addition, DeFalco notes, "A number of our people are taking col-

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lege courses and are using tapes while driving in conjunction with their studies. There is such a variety of things on tape today."

That variety — and growing consumer demand — are two points that may be escaping fleet managers or other officials of companies which operate fleets.

An annual study titled CAMIP (Continuous Automotive Marketing Information Program), conducted by Delco Electronics Corp., shows that an ever-increasing number of consumers say they will specify cassette players on their next car. Presently, that figure exceeds 70 percent. The Delco study also shows that General Motors presently has approximately 60 percent of its retail cars equipped with cassette players.

One of the major concerns of a fleet operator when it comes to cassette players, naturally, is cost. While DeFalco says his company is convinced that increased sales will more than offset the initial outlay, West says he looks at other factors as well.

> ***"I think we are innovative, a leader... as time goes on other fleet managers will realize the potential."***

"While I can't prove it statistically, I believe the desire of people to have cassette players in their vehicles today helps me sell my cars before the 'other guy' sells his," West says. He adds that many of his vehicles are offered for sale to company employees and, "if the sale is made to them, more revenue is received by our company than when the car has to be moved across the auction block.

"I can't say for sure, but I believe a cassette player really makes a difference," West says.

Looking to the future of cassette-player-equipped fleet vehicles, DeFalco says he believes once his company's training program is in full swing with the vehicles under the Sales & Distribution Division, other Nabisco divisions will follow.

"I think we are innovative, a leader," DeFalco says, "I believe that as time goes on, other fleet managers will realize the potential and become involved in similar programs. I suspect a lot of them just haven't thought about the possibilities."

Will the cassette player become a standard for all fleet cars of the future? As mentioned before, no one really knows. But when the average annual mileage of a fleet vehicle (more than 20,000) is translated into drive-time, the result is a lot of hours that employees and companies might want to explore additional ways to utilize...for the benefit of both. AF

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There was some good news for lessors and lessees alike in a recent survey by AALA. Led by decreases in expenses for interest, insurance, and repair and maintenance, '85 operating costs for closed-end leases actually dropped.

Operating Costs Down For Closed-End Leases

Reversing an upward trend for the first time in at least 20 years, 1985 operating costs dropped 2.6 percent over the previous year's figures for closed-end vehicle leases. That's the finding, at least, of the most recent survey of members of the American Automotive Leasing Association. According to that survey, '85 operating costs for closed-end leases totaled $322.92 per unit per month. The figure for '84, by contrast, was $331.58.

Other highlights of the AALA non-finance lease survey include a slight drop in the average number of months in operation (from 29.9 to 29.5); a move away from intermediates and compacts toward standard-size models; a significant increase in import share, and a strong trend toward retailing among closed-end disposition methods. The survey results were presented at AALA's recent annual meeting in Boca Raton, FL, by Earl Holtzman and Stuart Boykoff, both of the Skokie, IL-based AALA accounting firm, Michael Silver & Associates.

Comparing '84 to '85 closed-end operating costs in more detail, Holtzman noted that depreciation averages per unit per month rose during the period from $206.05 to $212.06, an increase of 2.91 percent. Repair and maintenance expenses, meanwhile, dropped from $33.40 to $30.03, or 10 percent. Insurance averages per unit per month fell from $16.57 to $13.71 (17.26 percent), while averages for license tags and taxes increased from $8.90 to $10.26, or 15.28 percent. Interest per-unit per-month averages decreased from $65.57 to $55.16, a 15.90 percent drop. Delivery per-unit per-month averages increased 55.96 percent, from $1.09 to $1.70.

Finally, general and administrative per-unit per-month averages fell from $34.94 to $33.44, or 4.29 percent. The total cost per closed-end unit per month for 1985 thus averages $356.36. The 1984 total was $366.52 — or 2.77 percent more. In 1980, by contrast, the average was $276.29; in '75, the figure was $193.95, and five years earlier it stood at $141.49. In 1965, costs per unit per month averaged just $103.81.

During 1985, the average composition of the AALA closed-end fleet also shifted interestingly. By year's end, compact cars accounted for 20 percent; intermediates for 45 percent, and standard-size cars for 35 percent. One year before, the figures had been 24, 57, and 19, respectively. The standard segment therefore grew at the expense of both

Analysis of Per Unit Month Costs for the Year 1985 (Closed-End)

	Depreciation	Repairs & Maintenance	Insurance	Tags & Taxes	Interest	Delivery	Total Operating Costs	General & Administrative	Total Costs	Average Months in Operation
Less than 1,000 cars Average costs	204.83	24.00	—	9.65	59.02	—	328.67	35.27	369.45	—
1,000-1,999 cars Average costs	208.34	29.12	10.00	17.00	65.00	1.65	330.89	42.01	372.90	—
Over 2,000 cars Average costs	221.16	36.98	14.95	8.62	51.74	1.80	319.11	27.32	346.43	—
Combined Average Costs	212.06	30.03	13.71	10.26	55.16	1.70	322.92	33.44	356.36	29.5

AALA Fleet Costs Survey For Closed-End Leases

Comparative Analysis of Average Per Unit Per Month Costs Years 1985 and 1984

OPERATING COSTS:	1985	1984	Increase (Decrease) Amount	Percentage	% of Total
Depreciation	$212.06	$206.05	($6.01)	(2.91%)	59.5%
Repairs and maintenance	30.03	33.40	(3.37)	(10.0)	8.4
Insurance	13.71	16.57	(2.86)	(17.26)	3.9
License tags and taxes	10.26	8.90	(1.36)	(15.28)	2.9
Interest	55.16	65.57	(10.41)	(15.90)	15.4
Delivery	1.70	1.09	(.61)	(55.96)	.5
Total Operating Costs	**$322.92**	**$331.58**	**($8.66)**	**(2.6)%**	**90.6%**
General and administrative	33.44	34.94	(1.50)	(4.29)	9.4
TOTAL COSTS	**$356.36**	**$366.52**	**($10.16)**	**(2.77%)**	**100.0%**

	1985	1984	1983	1982	1981	1980	1979	1978
Total costs per month	$356.36	$366.52	$328.13	$320.32	$306.82	$276.29	$247.98	$228.31
Avg. mos. in operation	29.5	29.9	30.2	28.1	27.3	27.4	26.6	26.3
Avg. annual mileage	—	34,923	29,770	34,646	31,894	34,591	28,952	30,609

compact- and intermediate-sized models in '85.

Similarly, closed-end fleet composition by manufacturer registered some changes during the past year. Chevrolet share dropped to 21 percent from the '84 figure of 26 percent. Ford rose one percentage point, to finish '85 with 14. Chrysler lost two percentage points, ending the year with 4. Pontiac, meanwhile, stayed at five percent; Oldsmobile fell from 13 percent to 11; Buick dropped from 18 to eight percent, and Cadillac remained at one percent. The biggest gains in penetration were shared by Lincoln-Mercury (from three percent in '84 to nine percent in '85), "others" (which zipped from two percent to eight), and imports, which soared from 13 percent to 19 percent.

Grouped together, leaders Chevrolet, Ford, and Chrysler netted 39 percent of the average closed-end fleet, compared to 45 percent one year before. (By way of comparison, share for that "Big Three" stood at 63 percent in '78 and 56 percent in '80.)

Closed-end used-car disposition showed 41 percent of the fleet being disposed of through used-car dealers (down from 46 percent a year earlier). Auctions accounted for seven percent of off-lease disposals (compared to 16 percent in '84), while sales to lessees and their employees rose one percent over '84 to 20 percent. Sales to new-car dealers shrank from nine percent in '84 to just 2 percent; "other" methods accounted for four percent. Most significantly, retail sales shot from 10 percent in '84 to 26 percent in 1985.

Holtzman and Boykoff also presented averages for open-end AALA fleets. That survey, too, reflected the shift toward standard-size cars in terms of fleet composition. The open-end standard figure for '85 was 36 percent (up from 33 percent in '84); intermediates were up one percent to finish at 48 percent, while compacts dropped to 16 percent in '85 from 1984's 20 share.

'85 open-end composition averages by manufacturer compared to a year earlier were 25 percent for Chevy (no change), 16 percent for Ford (down from 20 percent), six percent for Chrysler (no change), three percent Pontiac (a loss of one percentage point), 12 percent Oldsmobile (down one), nine percent Buick (off three), eight percent for Lincoln-Mercury (a gain of six points), five percent for Cadillac (no change), five percent for "other" (up two percent), and 11 percent for imports (up by a percentage point).

USED CARS

The following are average car prices for the period ending March 12, 1986. Prices are based on wholesale activity at major dealers across the country. They are divided into three zones as indicated on the accompanying map. These averages are calculated electronically on IBM machines. They are based on clean cars only. Proper allowance should be made for upgrading sharp cars and proper deduction taken for fair cars. Automatic transmissions have been included in the averages of all models. This information is published in *Automotive Fleet* by special permission of Automotive Market Report.

Model	Zone 1	Zone 2	Zone 3
83 AMC ALLIANCE			
Sdn 4DR L Series	2831	2859	2804
83 AMC CONCORD			
Sdn	3120	3152	3089
Sta Wgn	3295	3521	3262
83 BUICK SKYLARK			
Sdn Custom	3634	3670	3597
82 BUICK SKYLARK			
Sdn	2978	3007	2947
83 BUICK REGAL			
Sdn	4910	4960	4860
Cpe	5049	5100	4997
82 BUICK REGAL			
Turbo Cpe	4457	4500	4411
Cpe	4315	4358	4272
83 BUICK CENTURY			
Sdn Custom	4868	4915	4820
82 BUICK CENTURY			
Sdn Custom	4122	4162	4079
83 CADILLAC			
Cpe DeVille	8144	8226	8064
Sdn DeVille	8097	8180	8017
82 CADILLAC			
Cpe DeVille	6665	6732	6599
Sdn DeVille	6620	6686	6553
83 CHEVY			
Chvt Htchbk 4-Dr	2168	2189	2147
Camaro Cpe 8	5480	5536	5427
82 CHEVY			
Chvt Htchbk 4-Dr	1712	1729	1695
Camaro Cpe 8	4744	4792	4696
83 CHEVY CELEBRITY			
Sdn	4374	4419	4330
82 CHEVY CELEBRITY			
Sdn	3639	3675	3603
83 CHEVY CAVALIER			
Sdn	3712	3750	3676
82 CHEVY CAVALIER			
Sdn	2592	2617	2566
83 CHEVY CITATION			
Cpe 6	2894	2922	2863
82 CHEVY CITATION			
Cpe 6	2240	2264	2219
83 CHEVY MALIBU			
Clas Sdn	4233	4275	4191
Clas Sta Wgn	4407	4450	4362
82 CHEVY MALIBU			
Clas Sdn	3523	3559	3488
Clas Sta Wag	3678	3714	3642
83 CHEVY MONTE CARLO			
Cpe	5118	5168	5066
82 CHEVY MONTE CARLO			
Cpe	4252	4293	4208
83 CHEVY IMPALA			
Sdn	4591	4636	4544
82 CHEVY IMPALA			
Sdn	3677	3714	3640
Wgn 9	3822	3861	3784
83 CHEVY CAPRICE			
Sdn	5142	5195	5091
Sta Wag	5321	5375	5268

Model	Zone 1	Zone 2	Zone 3
83 CHRYSLER			
E-Class Sdn	4387	4432	4343
82 CHRYSLER			
New Yorker Sdn	5229	5281	5178
83 DODGE OMNI			
4 Dr Cust	2706	2733	2679
82 DODGE OMNI			
4 Dr Cust	2059	2078	2037
83 DODGE ARIES			
Cpe	3129	3162	3098
82 DODGE ARIES			
Sdn	2395	2417	2370
83 DODGE DIPLOMAT			
Sln Sdn	3706	3742	3669
82 DODGE DIPLOMAT			
Sln Sdn	2985	3015	2955
83 FORD FAIRMONT			
Futura 6-Cyl Sdn 4 Dr	3169	3200	3137
82 FORD FAIRMONT			
Futura Sdn 4-Dr	2510	2533	2484
83 FORD MUSTANG			
L-Cpe 4	3599	3634	3562
82 FORD MUSTANG			
L-Cpe 4	2878	2907	2850
83 FORD LTD			
Sdn	3613	3650	3577
82 FORD LTD			
Sdn	3741	3778	3706
83 FORD ESCORT			
Htchbk 4 Dr	2675	2700	2647
83 FORD CROWN VIC			
Sdn	5717	5774	5662
82 FORD CROWN VIC			
Sdn	4429	4475	4386
83 FORD THUNDERBIRD			
Cpe	5349	5403	5295
82 FORD THUNDERBIRD			
Cpe	4173	4214	4130
83 LINCOLN CONTINENTAL			
Sdn	10230	10333	10127
Mark VI Cpe	10408	10513	10304
82 LINCOLN CONTINENTAL			
Sdn	8244	8326	8162
Mark VI Cpe	8496	8579	8410
83 MERCURY COUGAR			
Cpe	5442	5495	5396
82 MERCURY COUGAR			
GS Cpe	3075	3106	3044
83 MERCURY LYNX			
HtchBk 2-Dr	2636	2662	2609
83 MERCURY MARQUIS			
Sdn	3656	3693	3620
82 MERCURY MARQUIS			
Sdn	3938	3978	3900
Wgn-2S	4061	4103	4021
83 OLDS CIERA LS			
Cpe	4799	4847	4750
Sdn	4859	4908	4811

Model	Zone 1	Zone 2	Zone 3
83 OLDS CUTLASS SUPREME			
Cpe	5344	5397	5291
Sdn	5194	5247	5143
82 OLDS CUTLASS SUPREME			
Sdn	4374	4418	4331
Cpe	4544	4591	4498
83 OLDS DELTA 88			
Sdn	5096	5148	5045
82 OLDS DELTA 88			
Sdn	3873	3912	3835
83 OLDS DELTA 98			
Sdn	7031	7102	6962
82 OLDS DELTA 98			
Sdn	5722	5779	5663
83 OLDS OMEGA			
Sdn	3634	3670	3597
82 OLDS OMEGA			
Sdn	2978	3007	2947
83 OLDS FIRENZA			
Sdn	3944	3984	3904
82 OLDS FIRENZA			
Sdn	3267	3298	3234
83 PLYMOUTH HORIZON			
4 Dr Htchbk	2632	2659	2604
83 PLYMOUTH RELIANT			
Cpe	3139	3170	3108
82 PLYMOUTH RELIANT			
Cpe	2386	2408	2363
83 PONTIAC FIREBIRD			
Cpe 8	5538	5593	5482
83 PONTIAC 6000			
Cpe	4633	4678	4585
Sdn	4570	4616	4523
82 PONTIAC 6000			
Cpe	3866	3906	3827
83 PONTIAC GRAND PRIX			
Cpe	5281	5333	5229
83 VOLKSWAGEN JETTA			
4 Dr Sdn	4601	4646	4556
82 VOLKSWAGEN JETTA			
4 Dr Sdn	3883	3922	3845
83 VOLKSWAGEN L SERIES			
2 Dr Htchbk	3359	3393	3325
82 VOLKSWAGEN RABBIT			
2-Dr Htchbk	2615	2640	2588
83 DATSUN			
Sentra 2 Dr Std Sdn	3023	3054	2993
Stanza Hbk 4 Dr Dlx	4121	4161	4079
82 DATSUN			
210 Std 2 Dr	2192	2214	2171
Sentra 2 Dr Std Sdn	2483	2507	2459
Stanza Hbk 4 Dr	3377	3411	3343
83 TOYOTA			
Corolla Sedan 2 Dr	3638	3675	3601
Celica St	5234	5286	5182
Camry Sedan	5913	5973	5855
82 TOYOTA			
Corolla 2 Dr Sdn	2940	2969	2911
Celica St Cpe	4273	4316	4229

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Honolulu, HI	167.4	138.4
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Kansas City, KS	89.6	88.6
Worcester, MA	105.4	102.4
Rochester, MN	127.4	92.4
Kansas City, MO	112.5	84.0
Wilmington, NC	106.4	88.9
Reno, NV	135.9	115.9
McAlester, OK	105.4	82.9
Lancaster, PA	137.0	123.5

Survey conducted during the first five working days of March 1985.
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